

County of San Diego
New: October 20, 2000
Reviewed: Spring 2003

TREASURER-TAX COLLECTOR SPECIALIST
SENIOR TREASURER-TAX COLLECTOR SPECIALIST

Class No. 002563
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DEFINITION:

Under general supervision, to perform tax collection, financial and accounting work of average difficulty and complexity in the Information, Financial, Special Functions, Payment Processing, Accounting or Deferred Compensation and Bonds Divisions of the Treasurer-Tax Collector; and to perform related work.

DISTINGUISHING CHARACTERISTICS:

This class series is allocated only to the Treasurer-Tax Collector.

Treasurer-Tax Collector Specialist: This is the journey -level class in this series. Perform tax collection, financial and accounting tasks of average difficulty and complexity. This class is distinguished from the next higher level class, Senior Treasurer-Tax Collector Specialist, in that the latter performs more difficult and complex tax collection, financial and accounting tasks, and may serve as lead staff in a small group of Specialists assigned to a specific functional area.

Senior Treasurer-Tax Collector Specialist: This is the journey/lead level class in this series. Perform tax collection, financial and accounting tasks of above average difficulty and complexity, and may serve as lead staff in a small group of specialists assigned to a specific functional area. This class is distinguished from the next higher level class, Supervising Treasurer-Tax Collector Specialist, in that the latter is a supervisory class that plans, directs, and organizes the work of a group of specialists assigned to one or more functional areas.

EXAMPLES OF DUTIES:

Collects and accounts for money; posts payments; balances and adjusts accounts; processes refund warrants; makes mathematical calculations; checks various statistical and accounting tables and reports; keeps subsidiary ledgers; compiles and records financial transactions; prepares periodic reports applying principles of bookkeeping and accounting; prepares and maintains tax records; checks refund and interest calculations and processes; answers tax questions and inquiries at the public counter and on the phone; interacts with real estate agents, large title companies, lending and mortgage companies on tax issues; operates personal computers, automated data entry equipment, microfiche and microfilm machines, adding machines and calculators; and follows prescribed departmental procedures in conducting all activities.

MINIMUM QUALIFICATIONS:

General Knowledge of:

- Office practices and procedures.
- Financial transactions and records.
- Mathematical computations for compiling and reviewing financial and statistical records.
- Principles of bookkeeping and accounting.
- California Revenue and Taxation Code, State Law, Civil and Bankruptcy Law, IRS rules and regulations.
- Basic principles and practice of supervision.

Skills and Abilities to:

- Understand and follow written directions and oral instructions in English.
- Communicate with the public and co-workers with ease, confidence and tact.
- Determine proper accounting codes and classifications for complex financial transactions.
- Understand routine financial transactions in terms of accounting codes and classifications.
- Operate office equipment such as: personal computers, terminals, printers, scanners, fax machines, photocopiers, typewriters, calculators, microfilm and microfiche reader/printers.
- Access and use data from computerized record keeping systems.
- Understand and interpret legal documents.
- Reconcile record keeping systems and related transactions.
- Understand the relationships among accounting or statistical records and documents.
- Retrieve, store and purge information in a wide variety of filing systems.

EDUCATION/EXPERIENCE:

Education, training and/or experience, which demonstrate possession of the knowledge, skills and abilities stated above. Examples of qualifying education/experience are:

Treasurer-Tax Collector Specialist:

1. One (1) year of experience processing financial or accounting transactions in a California Treasurer-Tax Collector's Office; OR,
2. Two (2) years of clerical experience including one (1) year of experience processing financial or accounting transactions.

Senior Treasurer-Tax Collector Specialist:

1. One (1) year of experience as a Treasurer-Tax Collector Specialist in the County of San Diego; OR,
2. Two (2) years of experience processing financial or accounting transactions in a California Treasurer-Tax Collector's Office; OR,
3. Three (3) years of clerical experience including two (2) years of experience processing financial or accounting transactions.

Note: Completion of twelve (12) units in accounting or taxation from an accredited college or university may substitute for one (1) year of work experience requirement.

SPECIAL NOTES, LICENSES, OR REQUIREMENTS:**Note:**

Some positions require the operation of a touch-key adding machine.

Certificate:

An original unaltered typing certificate (no photocopies) for at least 30 net words per minute with a maximum of 5 errors. The typing test must be for at least five minutes with 2 gross words penalty for each error (in accordance with

International Typing Contest Rules), and the certificate must be no more than two (2) years old. The certificate must state the gross words per minute attained and the number of errors.

Character:

Applicants must have a reputation for honesty and trustworthiness. Convictions, depending upon the type, number and date may be disqualifying.

Working Conditions:

Incumbents are subject to frequent hostility and anger from the public that produces the continuous possibility of personal liability suits and actual physical danger.

Probationary Period:

Incumbents appointed to permanent positions in this class shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).